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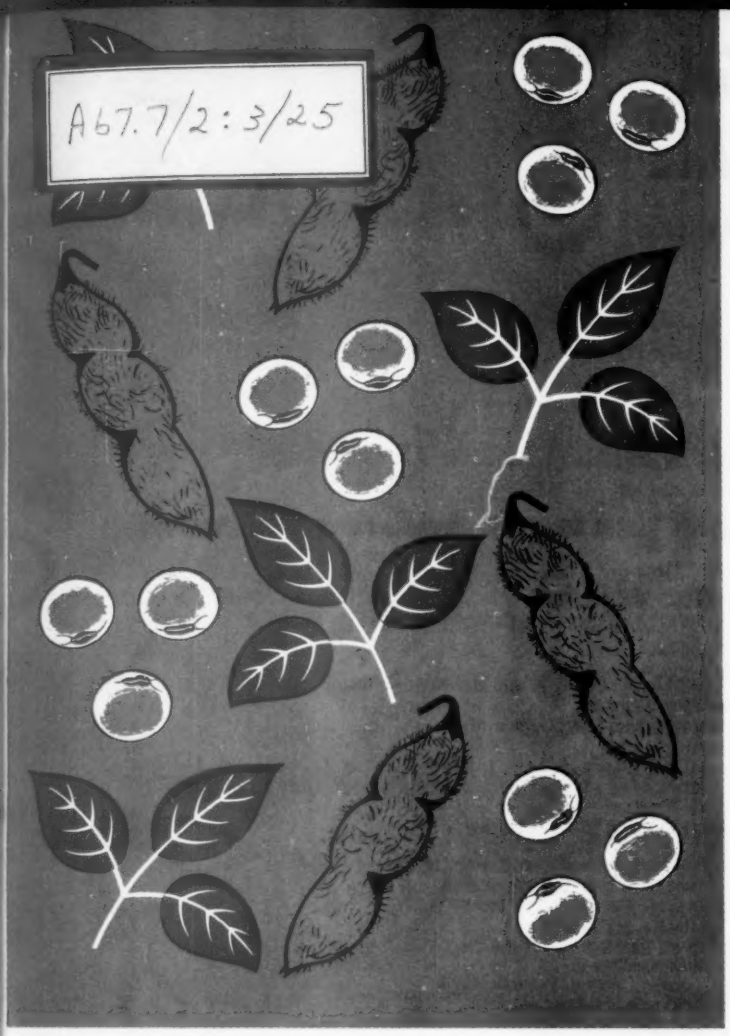

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SOYBEANS AGAIN A TOP DOLLAR U.S. EXPORT CROP

COLD SPRING CAUSES CONCERN TO JAPAN'S FARMERS

FOREIGN AGRICULTURE

Including FOREIGN CROPS AND MARKETS

A WEEKLY MAGAZINE OF THE UNITED STATES DEPARTMENT OF AGRICULTURE
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FOREIGN AGRICULTURE

Including FOREIGN CROPS AND MARKETS

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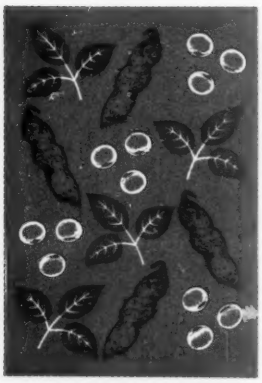

Our cover this week represents soybeans—often called the miracle crop. Twenty years ago, they barely showed up in our trade statistics; now they are U.S. agriculture's top dollar earner in the export field.

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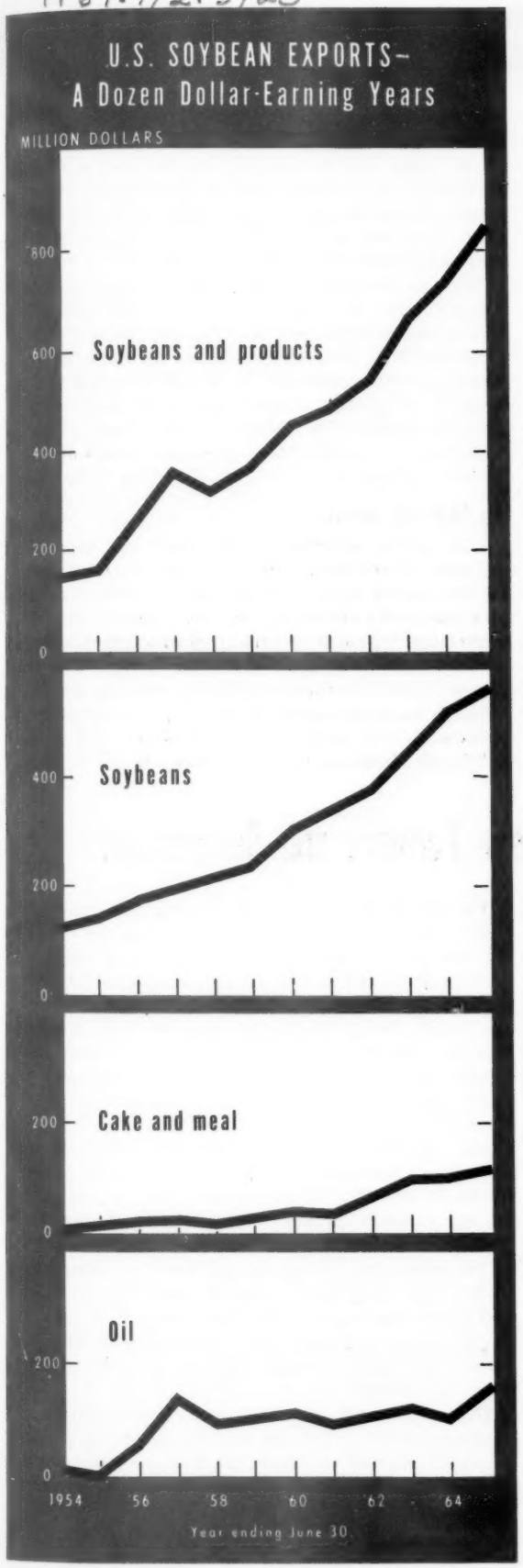

SOYBEANS

Again Rank as Top Dollar U.S. Export Crop

Record dollar exports of soybeans and soybean products in fiscal year 1965 are expected to carry the oilseed and product commodity group to a fourth consecutive year as top dollar earner among U.S. agricultural exports.

Commercial exports for dollars of this commodity group —chiefly soybeans, soybean meal, soybean and cottonseed oil—are estimated at $880 million for the year ending this June 30. Closest competitor in the dollar-sale export race is feed grains and products, with expected cash earnings of $785 million from sales abroad in fiscal 1965.

Of total oilseed and product exports, soybeans and soybean products are expected to account for about $750 million in cash export earnings, more than any other single U.S. farm crop. This is a new record high in cash exports of soybeans and also is the third fiscal year in a row that this crop has been the No. 1 dollar earner in the export market.

Total soybean and product exports, including soybean oil under government programs, in fiscal year 1965 are expected to reach a value of $850 million. The makeup of this current estimate is soybean exports, $560 million; soybean oil, $170 million; and soybean meal, $120 million.

Impact on U.S. economy

Exports of this scale, mostly dollar earnings, are obviously making a direct and very important contribution to the improvement of the U.S. balance-of-payments position. Shipments of such great quantities of soybeans also have a great impact on the U.S. agricultural economy, as underscored by these highlights from projected soybean export statistics:

- Soybean and soybean product shipments this year represent nearly 15 percent of the value of total agricultural exports (including concessional sales and donations under P.L. 480). The soybeans sold for dollars will account for about 13 percent of the value of overall dollar shipments of farm products abroad in fiscal 1965.
- Total export shipments of soybeans plus oil and meal should represent about 40 percent of total 1964 U.S. production of soybeans.
- The volume that is expected to move into export channels was grown on an area equal to the total harvested acreage of Illinois and Indiana, two of the leading farm States in the Nation.

Real growth in last 10 years

The record shipments in the current year culminate a rapid buildup of the export market for U.S. soybeans. Soybean exports prior to 1945 were negligible. As a matter of fact, this leading dollar export earner wasn't even

listed separately among crops shipped abroad prior to 1938 when total exports of soybeans and soybean oil were a meager 2 million bushels in bean equivalent.

The real growth in soybean and soybean product exports has come in the past 10 years. For example, in fiscal year 1955, soybean exports were only 51 million bushels. Exports of soybeans began moving at an accelerated rate in fiscal year 1960 when shipments reached 133 million bushels. Soybean exports for fiscal 1965 are estimated at 205 million bushels.

Exports of soybean oil have had a more rapid rate of increase—from 36 million pounds in fiscal 1955, to 928 million in fiscal 1957, and an estimated 1,300 million in fiscal 1965. Soybean meal exports also soared from 200,000 short tons in fiscal 1955 to 976,000 tons in fiscal 1962, and an estimated 2 million tons in fiscal 1965.

U.S. soybeans have become an ideal food and feed crop in many countries. Main importers are Japan, West Germany, the Netherlands, Canada, and Denmark.

Among these top customers, Japan is the only country which makes any large-scale use of soybeans for food. Other nations use the meal from crushing operations for animal feeds and the oil for food. More and more, our shipments to Japan are being used in this same way.

Why sales mounted

The rapid increase in soybean sales to these markets abroad is the result of a number of factors, but primarily reflects a growing demand for high-protein feed components for expanding livestock industries and intensive market promotion by the U.S. soybean industry in cooperation with the U.S. Government.

While dollar sales account for about 90 percent of total oilseed and product exports, government programs are an important factor in shipments of soybean and cottonseed oils. More than half of U.S. exports of these vegetable oils are under government programs, mainly sales for foreign currency under Title I of Public Law 480. Largest buyers under the concessional sales terms of this legislation are Turkey, Pakistan, and the UAR (Egypt). Government-program shipments under Public Law 480 also include donations under Titles II and III, barter, and long-term dollar credit sales under Title IV.

Soybeans have been largely responsible for the United States advance to a position of world leadership in oilseed production and trade since the end of World War II. Last year, U.S. producers accounted for more than one-fourth of world production of oilseeds, oils, and fats and supplied 37 percent of world exports of these products. In soybeans the U.S. position is even more dominant. Last year, the United States produced two-thirds of the world's crop and shipped almost 95 percent of its exports.

Big 1965 crop expected

U.S. exports of oilseeds and products are expected to continue to trend upward. If U.S. farmers followed through on their March planting intentions, the 1965 soybean crop may exceed 800 million bushels. The expansion of soybean exports and the rapid rise in oilseed meal exports—mostly soybean meal—is expected to continue in fiscal year 1966. Bigger exports of soybean and cottonseed oils are likely, although world production of the many kinds of edible oils —coconut, olive, palm, peanut, sunflower, and others— will largely determine the level of world trade.

Cold Spring Causes Concern to Japanese Farmers and Government

An abnormally cool spring in Japan this year has delayed the planting of rice in some northern areas and may have caused other damage, including some to winter grain crops. In addition, a long-range forecast by the Meteorological Agency indicates the possibility of the lowest summer temperatures in the past 180 years; and should this forecast prove to be correct, summer crops, especially in northern Japan, may be severely affected.

As of late May, crops in many regions of northern Japan were considerably behind schedule. Affected were Hokkaido, the northernmost of the Japanese islands; the northern tip of Honshu, the main island; the central strip of Honshu's Japan Sea coast; and Nagano Prefecture (heart of the raw silk industry), nearly in the center of Honshu.

Deep snow and cool weather delayed the melting of snow cover from many rice seedbeds, and rice planting was held up an average of 5 days—in some areas, as much as 10. Areas of greatest delay add up to about 200,000 acres, or 7 percent of the paddy fields in places involved.

Even after the seedbeds were planted, the germination and growth of the seedlings suffered from continued cool weather. In some areas, seedbeds had to be resown. On about 175,000 acres, or slightly over 5 percent of the fields in the areas involved, there was a delay of more than 10 days in transplanting the seedlings.

Other crops delayed or otherwise damaged in some parts of the country included wheat, barley, soybeans, pulses, white potatoes, summer vegetables, and mulberry.

Farmers already worried by the long and chilly spring were further upset by the Meteorological Agency's May 20 forecast for the summer, which raised these possibilities (reportedly on the basis of sunspot activities): More cold damage in northern Japan; drought along the coast on the Pacific Ocean side; heavy rainfalls along the Japan Sea side; and the likelihood of one or two typhoons in August, since this year has already been unusually prolific of typhoons in the South Pacific area from which these storms come.

This unfavorable weather, both present and potential, is creating considerable concern throughout government circles. In reflection of that concern, the government has set up a special agency—the Office for General Protection From Cold Weather Damage—under the direction of the Minister of Agriculture and Forestry. Experts from several other government agencies, including the Science and Technology Agency, the Meteorological Agency, and the Ministries of Finance and Transportation, will cooperate in taking all possible measures to reduce damage from cold weather.

Distressed by the possibility of low yields, farmers are campaigning for an increase in government rice purchase prices, by as much as 50 percent. Such an increase is unlikely, but the pressure for it points to the dire immediate concern of rural people in the areas involved.

—JAMES C. FRINK
Assistant U.S. Agricultural Attaché, Tokyo

Communist Countries Import Less Free World Cotton

Exports of cotton from the Free World to Communist countries declined during the first several months of the 1964-65 season, compared with a year ago.

Shipments to Communist countries have amounted to less than a million bales during the early months of the current marketing year. This is 27 percent lower than the 1,318,000 bales shipped in comparable months of 1963-64. There were substantial declines in exports to all Communist countries except East Germany, Hungary, and Poland.

The largest declines were in exports from Pakistan, Brazil, Sudan, British East Africa, and Greece. Reduced shipments from Pakistan were attributed to a sharp drop in takings by Mainland China. Brazilian exports to the USSR thus far this season have been sharply below a year ago. Egypt, India, Iran, Israel, Mexico, and Syria shipped more cotton to Communist countries this season.

Imports of cotton into the Free World from Communist countries, mostly from the USSR, totaled nearly 150,000 bales in the first several months of 1964-65, slightly above the 140,000 imported a year earlier. Quantities imported into major Free World countries from the Communist countries in the periods under review (in 1,000 bales, with comparable 1963-64 figures in parentheses) were Finland 42 (38); West Germany 41 (45); France 24 (20); United Kingdom 18 (10); Austria 7 (9); Italy 7 (7); and Japan 5 (11).

EXPORTS OF COTTON FROM FREE WORLD COUNTRIES TO COMMUNIST COUNTRIES, 1964-65 WITH 1963-64 COMPARISONS[1]

(1,000 bales of 480 lb. net)

Exporting country	No. of months[2]	Bulgaria	China	Czech.	E. Germany	Hungary
Brazil	5	---	---	---	---	1
British E. Africa	5	---	54	---	---	---
Egypt	5	2	15	24	13	9
Greece	8	2	---	4	---	11
Iran	5	---	---	11	---	36
Mexico (direct)	7	---	18	---	---	---
Pakistan	6	---	---	---	---	---
Sudan	4	---	6	---	---	2
Syria	8	15	170	11	3	27
Turkey	7	1	---	3	---	4
United States[3]	8	---	---	---	---	---
Other[4]	4	---	14	---	---	3
Total 1964-65		20	277	53	16	93
Total 1963-64		39	516	71	14	72

	No. of months[2]	Poland	Rumania	USSR	Total 1964-65	Total 1963-64
Brazil	5	---	---	7	8	143
British E. Africa	5	2	---	1	57	106
Egypt	5	14	8	168	253	246
Greece	8	17	---	16	50	73
Iran	5	20	---	22	89	71
Mexico (direct)	7	---	---	---	18	8
Pakistan	6	---	---	4	4	157
Sudan	4	5	---	---	13	65
Syria	8	35	43	69	373	351
Turkey	7	6	---	---	14	15
United States[3]	8	66	4	---	70	76
Other[4]	4	2	---	---	19	7
Total 1964-65		167	55	287	968	---
Total 1963-64		161	80	365	---	1,318

[1] Statistics for some countries are preliminary. This table does not include all cotton shipped from Free World to Communist countries. [2] Season beginning Aug. 1. [3] Running bales. [4] El Salvador, India, Israel, and Nigeria.

France Admits Some Beef From Argentina

The French Government has issued a notice in its *Official Journal* permitting imports of all types of beef and beef variety meats (including fresh and frozen) from animals produced in federally inspected plants in Patagonia (in southern Argentina).

U.S. Prices Attract Canadian Cattle and Beef

From January 1 to May 15, U.S. imports of cattle from Canada totaled 69,000 head—15 percent more than a year earlier—according to inspection records of the Canadian Department of Agriculture; and since then imports have increased substantially.

Practically all of the 1965 increase (9,000 head) has been in beef cattle (both for slaughter and feeding). Slaughter cattle imports during the week ended May 15 totaled 1,384 head compared with only 9 head a year earlier. Increased imports reflect relatively higher U.S. prices this year.

Beef imports from Canada have also increased. The total for January 1 - May 15 was 14.3 million pounds, compared with 8.2 million a year earlier. In recent weeks imports have shown a much larger gain. More than 1.3 million pounds entered during the week ended May 15, 1965, compared with 437,000 pounds in the same week of 1964.

Argentine Grain Sales Limited by Port Capacity

Argentine grain sales this year will be limited to about 10 million metric tons, an amount nearly equal to the handling capacity of port facilities. A total of about 5.5 million tons of wheat has been or will soon be sold for shipment in the current season. This is in addition to about 4 million tons of other grains that are also expected to be exported. As a result of limited port capacity, about 2.5 million tons of wheat from the bumper 1964 crop must of necessity be carried over into the 1965-66 marketing year.

According to the Argentine Grain Board, port facilities will be severely taxed owing to recently concluded sales involving large quantities of wheat. As a result, Argentina will be unable to make any more large sales of wheat this year even if the opportunity presents itself. Argentina's grain-handling capacity has declined in recent years to about 850,000 tons a month. The government is studying this problem and has plans underway to increase both grain handling and storage facilities. But the program will be of little assistance in exporting grain this year.

Japanese Purchase French Poultry

A Japanese trading firm has recently bought 176,000 pounds of French poultry for arrival in July. The price reported for frying chickens is 26.5 cents per pound c. & f. Japan, and that for "grillers," 28 cents.

The quality of French poultry previously brought to Japan for sampling is said to be good. The prices given are well below the current quotation of 32 cents per pound for U.S. broilers, c. & f. Japan.

Fishmeal Production and Exports by FEO Members

Production and exports of fishmeal by the six member countries of the Fishmeal Exporter's Organization (FEO) during the first 3 months of 1965 increased 3 and 9 percent, respectively, from the levels of January-March 1964.

These countries account for over 90 percent of the world exports of fishmeal. Peru, the world's leading producer, accounted for 74 percent of total exports by FEO countries in January-March 1965, the Republic of South Africa 7 percent, Norway 7, Chile 5, Iceland 4, and Angola 3.

PRODUCTION AND EXPORTS OF FISHMEAL BY FEO COUNTRIES, JANUARY-MARCH 1964 AND 1965

Country	Production		Exports	
	1964	1965	1964	1965
	1,000 metric tons	*1,000 metric tons*	*1,000 metric tons*	*1,000 metric tons*
Angola	14.9	13.3	13.4	16.3
Chile	47.4	33.8	42.9	31.1
Iceland	21.0	22.8	31.7	27.3
Norway	43.2	56.0	53.7	42.5
Peru	495.9	508.3	388.7	464.8
South Africa	63.8	74.3	44.6	42.4
Total	686.2	708.5	575.0	624.4

Fishmeal Exporter's Organization, Paris.

Germany's Imports of Fishmeal

West Germany, the world's second major importer of fishmeal, imported 398,164 metric tons in 1964 as against 301,535 tons in 1963. Peru was the major supplier in both years, accounting for 61 percent of the total in 1964 and 69 percent in 1963.

Guinea's Exports of Palm Kernels

Exports of palm kernels from the Republic of Guinea in 1964 totaled 13,854 metric tons, 9,844 tons less than the 23,698 exported in 1963.

Malagasy Tung Nut Production Rising

Tung nut production in the Malagasy Republic in 1964-65 is anticipated at 10,360 short tons, compared with 8,270 in 1964 and 6,340 in 1961.

Production is limited to the Miarinarivo and Soavinandriana areas in the Tananarive Province. The bulk of the crop is crushed domestically, and the oil is exported largely to France.

Tung oil exports from Malagasy in 1964 were 1,233 tons, compared with 945 in 1963. This is more than double the 566 exported in 1962. Average annual exports during the 1955-59 period were 768 tons.

Congo's Exports of Palm Products

Exports of palm kernels from the Congo (Brazzaville) during 1964 totaled 6,400 metric tons, valued at $829,000. This compared with exports of 9,700 tons in 1963 valued at $1,259,000.

Exports of palm oil amounted to 2,700 tons valued at $604,000, against 3,200 in 1963, valued at $707,000.

Argentine Sunflowerseed, Flaxseed Output Revised Upward

The 1964-65 Argentine sunflowerseed crop is now officially estimated at 730,000 metric tons or somewhat above the previous estimate of 707,000 tons (*Foreign Agriculture*, May 17, 1965). By this latest estimate, the current year's crop is nearly three-fifths above that of last year but 30 percent above average annual production for 1955-59. The gain reflects higher yields as well as acreage expansion.

Flaxseed production in 1964-65, according to the third official estimate, is placed at 32.1 million bushels—somewhat above the previous estimate of 30.5 million (*Foreign Agriculture*, Feb. 8, 1965). Production this year reflecting increased yields, was about 6 percent above the 30.4 million bushels produced in 1963-64.

World Tung Oil Imports Increase in 1964

Shipments of tung oil to major importing countries in 1964, at about 45,000 short tons, were up by more than one-fifth from those in 1963 but about one-third below the annual average for 1955-59.

The bulk of the increase in 1964 moved to the United States and Japan; shipments to Western Europe were only slightly above those in 1963. Shipments to the USSR and Poland, largely from Mainland China, are estimated to have been approximately at the 1963 level.

Argentina was the largest source of supplies. According to preliminary shipments data it supplied 20,291 short tons, compared with 17,678 tons in 1963. But shipments from Mainland China, judged by imports into specified countries, rose to about 18,200 tons, significantly above the 13,400 tons of 1963.

The sharp gain in U.S. imports of tung oil in 1964, largely from Argentina and Paraguay, diverted a significant volume from the traditional markets of Western Europe. Remaining requirements of these markets were, however, satisfied by the sharp upturn in shipments from Mainland China, which might well continue this year.

IMPORTS OF TUNG OIL INTO SPECIFIED COUNTRIES

Destination	Average 1955-59	1961	1962	1963[1]	1964[1]
	Short tons	*Short tons*	*Short tons*	*Short tons*	*Short tons*
North America:					
Canada	2,106	1,451	1,310	1,108	1,430
United States[2]	10,635	3,539	6,303	9,404	14,106
Mexico	181	94	181	154	[3]150
Cuba	112	---	---	---	---
Total	13,034	5,084	7,794	10,666	15,686
Europe, West:					
Austria	338	340	244	202	295
Belgium	507	386	382	331	[3]345
Denmark	686	543	423	385	519
France	2,582	2,763	1,731	2,282	2,259
Germany, West	5,228	5,347	4,004	3,150	3,678
Italy	876	1,625	1,758	1,620	1,276
Netherlands	1,071	1,134	990	998	1,197
Norway	848	584	129	90	255
Sweden	1,192	1,152	873	845	1,046
United Kingdom	10,816	8,000	5,987	6,054	5,441
Total	24,144	21,874	16,521	15,957	16,311
Europe, East:					
Poland	2,512	2,435	2,471	2,425	[3]2,450
USSR	18,280	4,080	7,390	1,980	[3]2,000
Asia and Oceania:					
Hong Kong[2]	870	1,055	370	578	1,422
India	245	441	423	270	288
Japan	4,812	6,265	4,598	3,321	5,341
Malaysia	151	212	278	177	176
Australia[4]	1,910	1,767	1,262	1,258	1,196
New Zealand	302	272	[3]220	[3]150	[3]180
Total	8,290	10,012	7,151	5,754	8,603
Grand total	66,260	43,485	41,327	36,782	45,050

[1] Preliminary. [2] Net imports. [3] Estimated. [4] Year ending June 30. Compiled from official and other sources.

Ceylon's Copra and Coconut Oil Exports

Exports of copra and coconut oil from Ceylon during 1964 totaled 154,731 long tons, oil basis, compared with 108,634 in 1963. Coconut oil exports during 1964 increased by 36,493 tons, or 45 percent, to total 117,559 tons as against 81,066 in 1963. Copra exports increased 15,006 tons, or 35 percent, to 58,081 tons.

Rhodesian Flue-cured Tobacco Exports

Exports of flue-cured tobacco from Rhodesia and Western Zambia in the first quarter of 1965 totaled 21.4 million pounds—more than double those of January-March 1964. The big increase reflects the record 1964 crop, shipments of which were continuing well into 1965.

Countries purchasing more tobacco this year included the United Kingdom, Hong Kong, New Zealand, West Germany, Belgium, and the Netherlands.

RHODESIAN FLUE-CURED TOBACCO EXPORTS[1]

Destination	January-March		
	1963	1964	1965
Commonwealth:	*Mil. lb.*	*Mil. lb.*	*Mil. lb.*
United Kingdom	2,490	2,105	3,439
Hong Kong	1,871	648	2,439
Malaysia	1,675	1,420	1,235
Australia	1,150	793	703
New Zealand	245	371	651
Others	769	858	1,205
Total	8,200	6,195	9,672
Non-Commonwealth:			
Germany, West	201	213	2,845
Belgium	371	146	2,297
Netherlands	941	402	2,090
Japan	---	1,047	1,036
Switzerland	146	558	404
South Africa, Rep. of	63	278	399
Portugal	67	161	341
Denmark	265	118	273
Norway	240	120	265
Others	901	866	1,734
Total	3,195	3,909	11,684
Grand total	11,395	10,104	21,356

[1]Includes Southern Rhodesia and Western Zambia.
Tobacco Intelligence, London

Libya's Cigarette Output Continues To Rise

Cigarette output in Libya continued its upward trend through 1964. Production last year amounted to 855 million pieces, 14.6 percent more than the 746 million produced in 1963.

Production of cigars rose to 1,672,050 pieces last year, from 1,441,000 in 1963. Production of chewing tobacco reached 248,000 pounds, compared with 171,000 in 1963. Snuff production also rose, to 24,000 pounds from 21,500; and production of tombac, at 111,500 pounds, was up almost 30 percent from the 1963 level of 85,800.

Australia's Tobacco Imports Up Slightly

Australia's imports of unmanufactured tobacco in 1964 totaled 28.5 million pounds, compared with 27.5 million in 1963. Takings of U.S. tobacco, at 14.8 million pounds, however, were about 4 million below those of 1963. The U.S. share of the import market was 52 percent compared with 69 percent the previous year.

Major suppliers of tobacco to Australia, other than the United States, included Rhodesia, Zambia, and Malawi 5.7 million pounds; the Republic of South Africa 4.7 million; and Canada 357,000.

AUSTRALIA'S IMPORTS OF UNMANUFACTURED TOBACCO

Origin	1962	1963	1964
	1,000 pounds	*1,000 pounds*	*1,000 pounds*
United States	19,180	18,886	14,811
Rhodesia, Zambia, Malawi	4,655	3,243	5,702
South Africa, Rep. of	2,347	4,170	4,720
Canada	978	515	357
Others	623	660	2,886
Total	27,783	27,474	28,476

Mexico's Tobacco Exports Drop

Mexico's 1964 exports of unmanufactured tobacco totaled some 19.8 million pounds—down 28 percent from the record volume 27.5 million in 1963. Reduced shipments of light tobaccos accounted for the decline.

Exports of light tobaccos (mainly burley and native sun-cured) were 18.6 million pounds in 1964, compared with 26.9 million in 1963. Major destinations for Mexican leaf in 1964 included the United States, Panama, Switzerland, and France.

Average export prices of light tobacco shipped to major destinations in 1964, in terms of U.S. equivalents per pound, were the United States 25.4 cents, Panama 16.4, Switzerland 18.6, and France 16.3. The average export value for total shipments of light tobaccos was 21.4 cents.

MEXICO'S TOBACCO EXPORTS

Destination	1963		1964	
	Light tobacco	All tobacco	Light tobacco	All tobacco
	1,000 pounds	*1,000 pounds*	*1,000 pounds*	*1,000 pounds*
United States	1,710	1,979	5,726	6,052
Panama[1]	6,523	6,523	4,956	4,956
Switzerland	1,345	1,345	4,519	4,566
France	2,955	2,955	994	994
Uruguay	---	57	---	573
Finland	226	226	262	262
Belgium	328	336	149	215
Denmark	308	308	136	136
Germany, West	7,497	7,587	54	95
USSR	4,805	4,805	---	---
Portugal	555	555	---	---
Others	684	832	1,778	1,959
Total	26,936	27,508	18,574	19,808

[1]Presumably ultimately destined to Italy.

Rhodesian Flue-cured Auction Sales

Auction sales of flue-cured tobacco on the Salisbury, Rhodesia, market averaged the equivalent of 44.1 U.S. cents per pound for the thirteenth week of sales, which ended June 2. Sales for the week totaled 9.8 million pounds.

Season sales through the thirteenth week totaled 105.6 million pounds, at an average of 41.6 cents, compared with 117.8 million, at an average of 33.1 cents, for the comparable period last year.

Bulgaria's Cigarette Output Continues To Rise

Cigarette output in Bulgaria continued upward through 1964. Production last year amounted to 49.4 million pounds and was 18.4 percent larger than the 41.7 million produced in 1963. The substantial rise in exports more than offset a slight decline in domestic sales and was the main contributing factor to the significant increase in output over the previous year.

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Exports of cigarettes last year toaled 27.3 million pounds, compared wih 18.0 million in 1963 and 16.1 million in 1962. Other countries within the Soviet Bloc continued to be the principal export destination for these shipments.

Domestic sales last year amounted to 22.3 million pounds and were 6 percent below the 1963 high of 23.8 million, (*Die Tabak-Zeitung*, May 21, 1965).

Korea's Record Output of Tobacco Products

Output of tobacco products in the Republic of South Korea during 1964 set a new record. Combined output of cigarettes and cut tobacco amounted to 67.2 million pounds or 5.5 percent greater than the 1963 level of 63.7 million.

Cigarette output, at 48.1 million pounds, was 14 percent larger than the 42.2 million produced in 1963. However, the production of cut tobocco dropped to 19.1 million pounds from 21.5 million in 1963.

Iran Expects Near-Average Almond Crop

Iran's 1965 almond crop is forecast at 7,700 short tons, shelled basis—up only slightly from the 1959-63 average crop of 7,300 tons and the 7,200-ton 1964 crop. Exports for 1964-65 are running well ahead of the level of a year earlier. Exports for the first 6 months of the season totaled 1,687 tons, shelled basis—up 72 percent more than the 979 tons of the same period the year before.

IRAN'S ALMOND SUPPLY AND DISTRIBUTION

Item	1962-63	1963-64	1964-65
	Short tons [1]	*Short tons* [1]	*Short tons* [1]
Beginning stocks (Sept. 23)	1,100	---	1,100
Production	8,300	5,500	7,200
Total supply	9,400	5,500	8,300
Exports	6,600	1,800	3,300
Domestic disappearance	2,800	2,600	3,300
Ending stocks (Sept. 22)	---	1,100	1,700
Total distribution	9,400	5,500	8,300

[1] Shelled basis.

Spanish Almond Crop Down

Spain's 1965 almond crop is forecast at 30,000 short tons, well below the 1964 crop of 35,000 short tons but virtually the same as the 29,800-ton 1959-63 average crop. The large 1964 crop occurred in spite of severe drought in the Levant region; it reportedly damaged trees as well as reducing the crop. The quality of the 1964 crop was reported to be good, although the percentage of small kernels was higher than usual.

Italy To Have Another Good Almond Crop

Italy's 1965 almond crop is forecast at 40,000 short tons—virtually unchanged from the 39,000-ton 1964 crop but somewhat above the 1959-63 average of 37,000 tons.

So far, Italy's 1964-65 exports (September-January) are running well below the 1963-64 level for the same period. Export prices have begun to rise and the Italian trade expects them to average 2.5-5.0 cents a pound higher than last year.

Australian Canned Fruit Pack Revised

The 1965 Australian canned fruit pack estimate has been revised upward to 8.5 million cases—an increase of approximately 800,000 cases over earlier reports.

Canned peaches, which were previously forecast at 3.5 million cases, are now figured at 4.3 million. The canned pear pack estimate has been reduced by 200,000 cases and is presently set at 2.5 million. Mixed fruits have been revised upward by 194,000 cases and now total 894,000 cases. The estimate of canned apricot production has not been altered and is still placed at roughly 800,000 cases.

Ending stocks of Australian canned fruit in 1965 may be larger than previously anticipated because of increased domestic production, a large 1965 carry-in, and greater competition for world markets.

India Permits Molasses Exports

The Government of India recently authorized the export of limited quantities of molasses after a lapse of about 14 months. Exports are being allowed in view of the sharp increase in the production of factory sugar and the resultant larger availability of molasses during the 1964-65 sugarcane crushing season.

Production of molasses during 1964-65 is expected to reach 225 million gallons. Exports of molasses in calendar 1964 were only 2.5 million gallons, compared with 18.5 million in 1963.